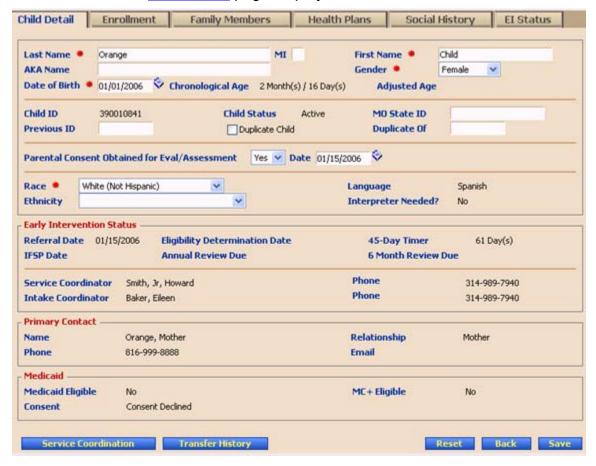
Cost Participation

How Do I Enter or Update a Monthly Fee Determination

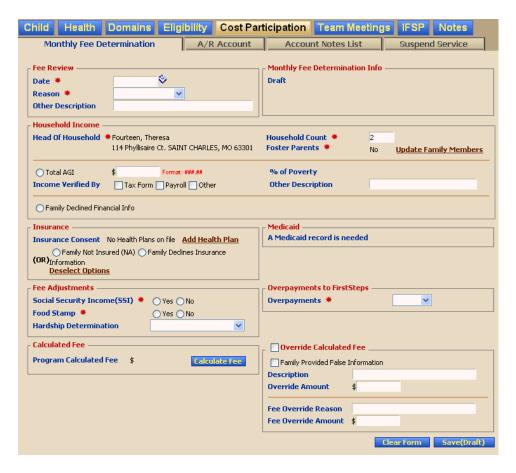
Use this exercise to enter, update, or view a household's monthly fee determination (MFD).

Complete the following steps to finish this exercise:

1. On the Child List page, click the licon in the **Detail** column for a specific child record. The Child Detail page displays.



2. Click the **Cost Participation** tab. The <u>Monthly Fee Determination</u> page displays.



- 3. Complete the following information under **Fee Review** as necessary:
 - In Date, enter or select the date on which the meeting with the family took place and the financial information for the monthly fee determination was provided by the family. The date entered must be less than or equal to today's date. The date entered cannot be prior to the referral date. The date entered cannot be equal to or less than the previous review date.
 - In Fee Review Reason, select the reason for the fee review.
 When Other is selected, entry is also required in Other Description.
 - In Other Description, enter a brief description of the reason for the fee review. This is required information whenever the Other option is selected in the Fee Review Reason drop-down list.

Tip: The Annual review must be marked as the reason and held within 31 days prior to the Annual IFSP meeting date to be counted. The Annual IFSP meeting edits will require either the Initial Fee review and/or an annual review was performed to finalize the meeting. The record must be marked as an Annual review and has been held within the last 31 days as of the meeting date to get counted as complete.

- 4. In Monthly Fee Determination Info displays "Draft" until a record is confirmed. After a record is confirmed the following information displays the Fee amount to be charged to the A/R account, the determination period, and the date of the next Annual Fee Review is due. The Determination period start date (confirmed date) is used by the system for statement generation. The end date is blank until a new Monthly Determination record is created or unless the enrollment for the last active child record in the household is ended. The Annual Review Due date is dete4rmined on the free review date that has a review reason of Initial or Annual. If a child is returning to the program and a previous MFD record exists, a new fee review must be entered.
 - 5. Complete the following information under **Household Income**:
 - Head of Household displays the name and address information of the child's current head of household. This information is read-only and cannot be changed.
 - In Household Count, displays the number of active members in the household. User may change the count displayed. The number entered must be equal to or greater than 2 (head of household and child).
 - Foster Parents indicates whether any currently active members of the household have the role of Foster. If a currently active member of the household is a foster, that member's name is also displayed. When available, you can click the **Update Family Members** link to display the Family Members List page to update family member information as necessary.
 - In **Total AGI**, enter the adjusted gross income for the household. The value entered must be greater than \$0.00. When a value is entered, at least one of the **Income Verified By** check boxes must be selected.
 - % of Poverty displays the household's calculated percentage of poverty based on federal poverty guidelines, the Total AGI, and the Household Count. This information is read-only and cannot be changed.
 - In Income Verified By, select one or more of the following check boxes as necessary (the selection of at least one check box is required information if the Total AGI is entered):
 - Select **Tax Form** to indicate that the income was verified by a tax form.
 - Select Payroll to indicate that the income was verified by a pay stub.

- Select Other to indicate that the income was verified by another method. When this check box is selected, an entry is required in Other Description.
- Select Family Declined Financial Info to indicate that the family declined to provide financial information.

Note: The **Head of Household <u>must</u>** be displayed to calculate a fee. At least one income option must be entered (**Total AGI**) or selected (**Family Declined Financial Info**) under **Household Income** to calculate a fee.

- 6. Under **Insurance**, view information in the following columns of the **Insurance Consent** table for each active insurance carrier associated with the household:
 - Edit provides a link to the health insurance carrier's detail page.
 - Carrier Name displays the name of the insurance carrier.
 - Status displays the current consent status for the insurance carrier.

Note: If no health plans currently exist for the household, **No Health Plans Listed** is displayed instead of the **Insurance Consent** table.

- 7. If no health plans currently exist for the household, select one of the following radio buttons under **Insurance**:
 - Select **Family Not Insured** to indicate that the family is currently not insured under any health plan.
 - Select **Family Declines Insurance Information** to indicate that the family declined to provide health plan information.

Family Declines Insurance Information radio button selections. At least one health plan must be displayed or one of the options must be selected under Insurance to calculate a fee.

- 8. Under **Medicaid**, view information in the **Medicaid Consent** table for each child within the household:
 - Child Name displays the name of the child.
 - Enrolled displays the child's current Medicaid enrollment status
 - Status displays the current consent status for the child's Medicaid record.

Needed is displayed instead of the Medicaid Consent table. At least one active Medicaid record must be displayed to calculate a fee.

- 9. Complete the following information under **Fee Adjustments**:
 - In **Social Security Income (SSI)**, select whether the current household receives Social Security income.
 - In **Food Stamps**, select whether the current household receives food stamps.
 - In **Hardship Determination**, select If applicable, a financial hardship option. If a financial hardship does not exist, do not make a selection.
- 10. Under **Overpayments to First Steps**, select the option indicating whether the family chooses to donate over_payments or to refund over_payments for credit balances on the family's account.
- 10. View the following information under Calculated Fee:
 - Click **Calculate Fee** to calculate the fee determination information for the current household based on the information on this page.
 - Program Calculated Fee displays the calculated fee determination for the current household based on the information on this page.
 - The Fee Basis table displays the fee basis reason(s) used by the application to calculate the fee determination for the current household. More than one Fee Basis Reason(s) can be displayed in the table.

whote: The Program Calculated Fee and the Fee Basis Reasons are not displayed until after the Calculate Fee button is clicked. After the Calculate Fee button is clicked, any changes or modifications made to the information on the page changes the fee to \$0.00. The Calculate Fee button must be clicked each time a change is made to the record. You can click the Calculate Fee button as many times as necessary until the fee record is confirmed.

- 11. To override a calculated fee, select the **Override Calculated Fee** check box and complete the following information:
 - If the family provided information that was false, select the Family Provided False Information check box and complete the following information:
 - In **Description**, enter a brief description of the information that was falsified.
 - In **Override Amount**, enter the total amount of the override. The value entered must be greater than \$0.00.
 - The Calculated Fee can be overridden by entering the following information:
 - In **Fee Description**, enter a brief description of the fee override.

- In **Fee Override Amount**, enter the total amount of the fee override. The value entered must be greater than \$0.00.
- 12. Click the following button(s) as necessary:
 - Click Print to print the details of the current MFD on your printer.
 - Click **History** to view the MFD history for the household. The <u>MFD</u>
 <u>History</u> page displays.
 - Click Save (Draft) to save the current MFD information as a draft.
 This button is only available when an unconfirmed MFD is displayed.
 - Click **Clear Form** to clear any data entered and display the default information for the page.
 - Click View Previous to view a previously confirmed MFD for the household. This button is only available when an unconfirmed MFD is displayed and a previously confirmed MFD is on record for the household.
 - Click Edit to edit the MFD. This button is only available when a confirmed MFD is displayed.
 - Click Confirm Fee to return to the previous page. This button is only available when an unconfirmed MFD that has already been saved as a draft is displayed, the calculate fee process has been performed, and no changes have been made since the calculate fee process was performed.
- 13. The Fee Basis list and fees in Priority order:

| 1 | False Family Information | override amount |
|----|--|--------------------|
| 2 | SC Override | override amount |
| 3 | Medicaid Enrolled | 0 |
| 4 | Foster Family | 0 |
| 5 | Family Declined Insurance/Financial Info | max |
| 6 | Insurance Consent Declined | max |
| 7 | AGI < 200% Federal Poverty Level | 0 |
| 8 | SSI | 0 |
| 9 | Food Stamps | 0 |
| 10 | Medicaid Consent Declined | calculate |
| 11 | Hardship | 0, 5, or calculate |
| 12 | Adjusted Gross Income | calculate |

The applicable fee basis with the highest Priority on the list (lowest number) is the primary fee basis

Two examples:

A household is a Foster Family (4), Declined Insurance Consent (6), and is on Food Stamps (9). Based solely on the highest Priority among these applicable Fee Bases (4), the fee is set to 0.

Another household Declined Medicaid Consent (10) and has had a Hardship declared that would set the fee at \$5 (11). Instead, the fee is set to \$100, because of the highest priority Fee Basis (10).

How Do I Print the Details of a Monthly Fee Determination

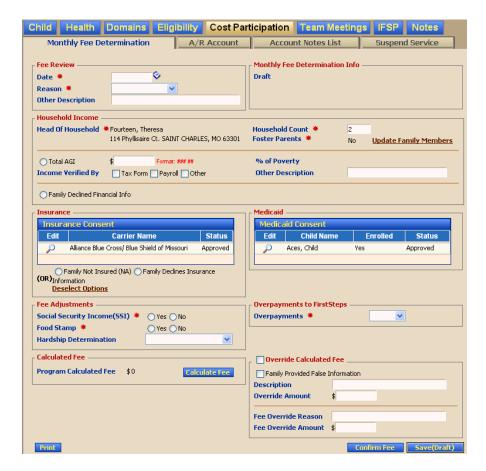
Use this exercise to print the details of a monthly fee determination (MFD) for a household.

Complete the following steps to finish this exercise:

1. On the Child List page, click the licon in the **Detail** column for a specific child record. The Child Detail page displays.



2. Click the **Cost Participation** tab. The <u>Monthly Fee Determination</u> page displays.



3. Click **Print**. A page containing the printer-friendly version of the Monthly Fee Determination record is displayed. Use your browser's print function to print the page as necessary.

Please refer to your browser's online help system for the printing options that are specific to your browser.

View the Monthly Fee Determination History for a Household

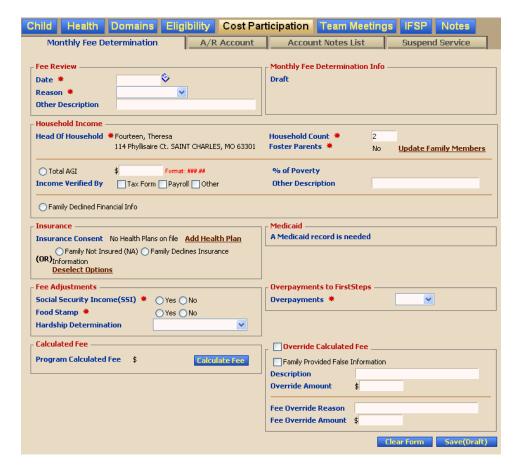
Use this exercise to view a household's monthly fee determination (MFD) history.

Complete the following steps to finish this exercise:

1. On the Child List page, click the child record. The Child Detail page displays.



2. Click the **Cost Participation** tab. The <u>Monthly Fee Determination</u> page displays.



3. Click **History**. The MFD History page displays.



4. View a list of the household's confirmed Monthly Fee Determination period and the monthly fee for each period on the **Monthly Fee Determination List** table. Selecting the detail link for a particular determination period will display the Monthly Fee Determination record for that period.